QikSKAN

Step by Step User Guide

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7/11/14

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About QikSKAN

Installation

System Requirement

Processor	Intel® Core™ i5-3317U CPU @ 1.70GHz 1.70GHz
Installed RAM	4.00 GB (3.89 GB usable)
System type	64-bit operating system, x64-based processor
Pen and touch	Pen and full Windows touch support with 10 touch points
Windows Edition	Windows 8.1 Pro

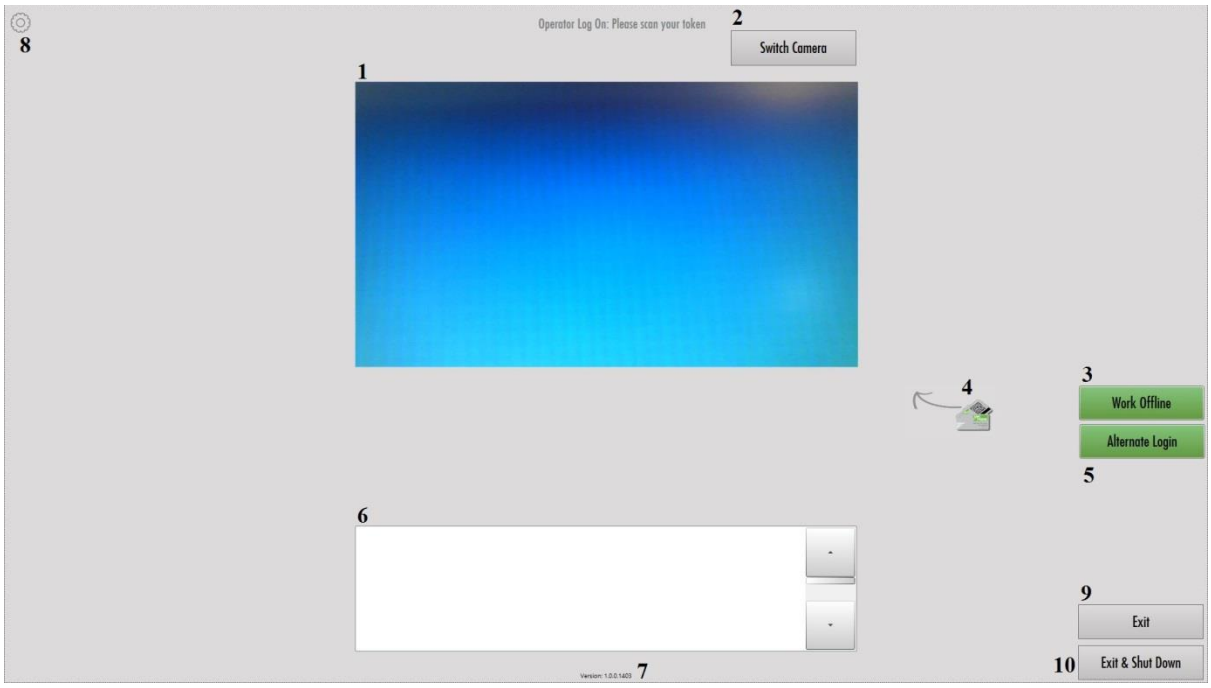
Setup

QikSKAN is preinstalled on Surface with Windows 8.1 Pro with resolution 1920x1080 (recommended).

USING QIKSKAN

INTRODUCTION

Launch QikSKAN: Locate QikSKAN shortcut icon on the desktop and press (or touch) twice on icon to launch QikSKAN. QikSKAN will automatically check for updates and present the operator log on screen. **Operator log on screen** is shown with features description as below.



1 – Camera display section for token scan.

2 – Button to switch between cameras.

3 – Button to enable **offline** mode of QikSKAN for enrolment and ID scanning.

4 – Icon to indicate user to bring token in front of camera to log on.

5 – An alternative log on button, using a mobile number or email address.

6 – List of active users for quick log on selection.

7 – QikSKAN latest release number.

8 – Setting options for QikSKAN.

9 – Button to exit from QikSKAN application.

10 – Button to close application and shut down Surface.

LOG ON TO QIKSKAN

There are 3 different ways to login into QikSKAN. Follow these steps to login.

STEPS for QUICK-LOGIN

1. Select your name from the list of active operators.
2. Press [Take Photo] button underneath the camera feed when your face is fully visible (retake if need), then press [Continue].
3. Enter the PIN associated with your account.

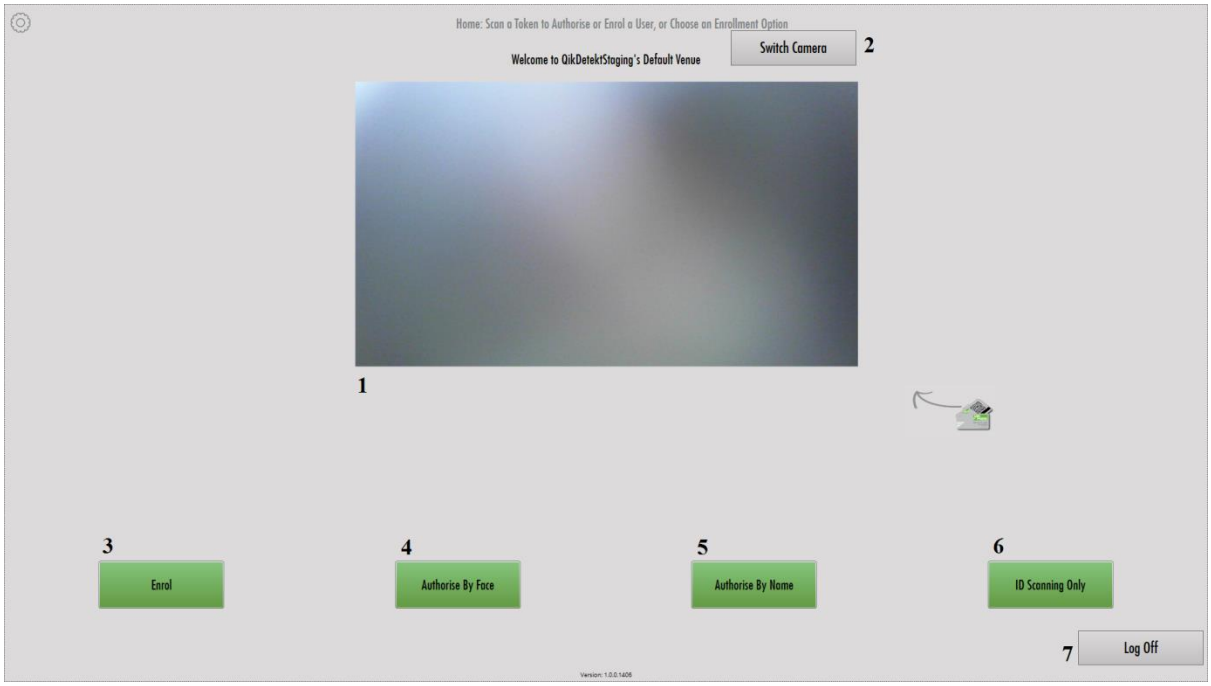
STEPS for TOKEN SCAN

1. Scan your TOKEN to login by holding it so that the QR code is fully visible in the camera display section. Wait for the camera to focus on it properly.
2. Press [Take Photo] button underneath the camera feed when your face is fully visible (retake if need), then press [Continue].
3. Enter the PIN associated with your account.

STEPS for ALTERNATE LOGIN

1. Press [Alternate Login] button.
2. Enter one of the contact options, your email or Mobile phone number then press [Next] button.
3. Enter the PIN associated with your account.
4. Press [Take Photo] button underneath the camera feed when your face is fully visible (retake if need), then press [Log In] button.
5. Enter the confirmation code sent to the contact address supplied then press [Submit Confirmation Code] button.

Venue Selection: On successful login and depending on the settings for the current device, you may be presented with the Venue Selection screen. If so, select the current venue from the list. If operator & device is configured to the specific venue, QikSKAN will automatically select the venue. The **main screen for QikSKAN is shown below with a brief description.**



1 – Camera display section for **token scan** authorisation.

2 – Button to switch between cameras.

3 – Button to **Enrol** new patron.

4 – Button to **Authorise patron by Face**.

5 – Button to **Authorise patron by Name**.

6 – Button to Authorise patrons by **ID Scanning Only**.

7 – Button to Log off and return to login screen.

IN OFFLINE MODE

QikSKAN can be used in offline mode when there is no network (internet) connection available, but it can be selected even with a network connection by pressing the [Work Offline] button on operator log on screen, shown above. This mode is faster than standard (online) mode, as the device doesn't have to wait for authentication from the database when enrolling or authenticating users, though most of the features of QikSKAN are disabled. When QikSKAN is **launched without** a connection to the internet, it will display a message and Network Offline icon as shown below.

Press the Retry button for network reconnection, otherwise press the Work Offline button to use QikSKAN in offline mode. The **work offline screen** as show below.

1 – Button to start enrolment of new patron in offline mode

2 – Button to Authorise patrons by **ID Scanning Only**.

3 – Network Offline icon to show that QikSKAN is running in offline mode.

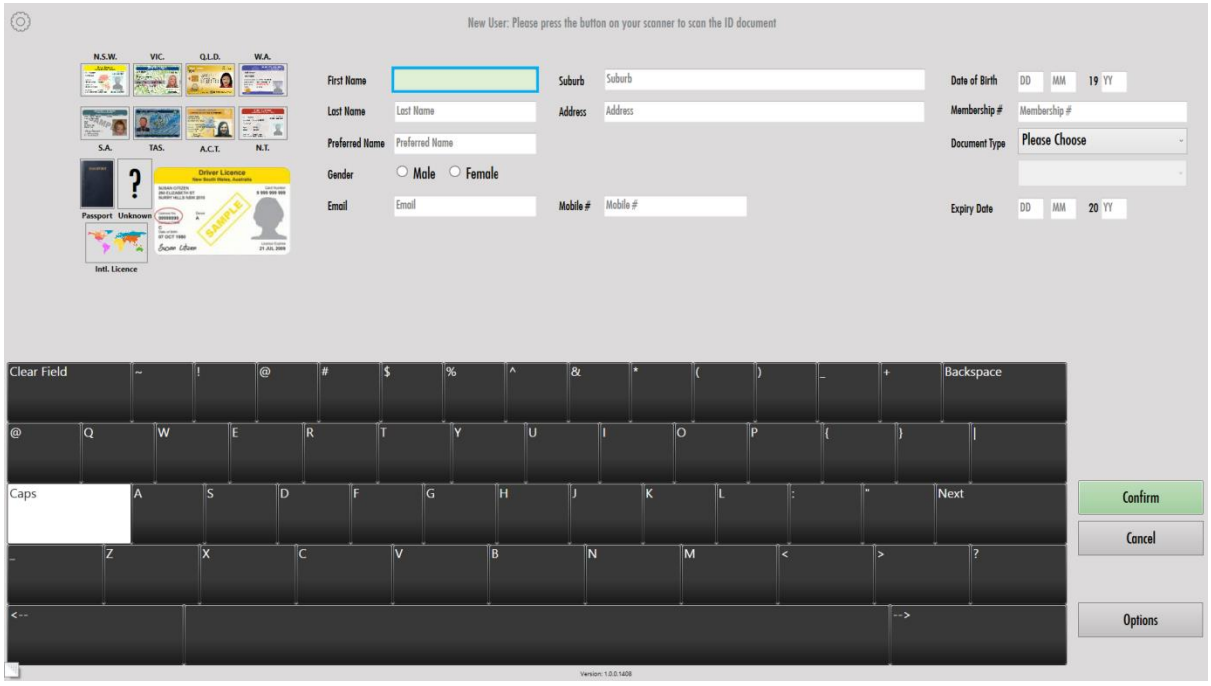
If the connection to the internet is lost while QikSKAN is logged in and running, icon is displayed in the top-right corner of the screen. This means that offline mode is enabled, and no authentication checks will occur, as the database is unreachable.

To Enrol a New Patron

QikSKAN will allow the operator to enrol a new patron in both online and offline modes. The standard procedure of enrolment is explained below.

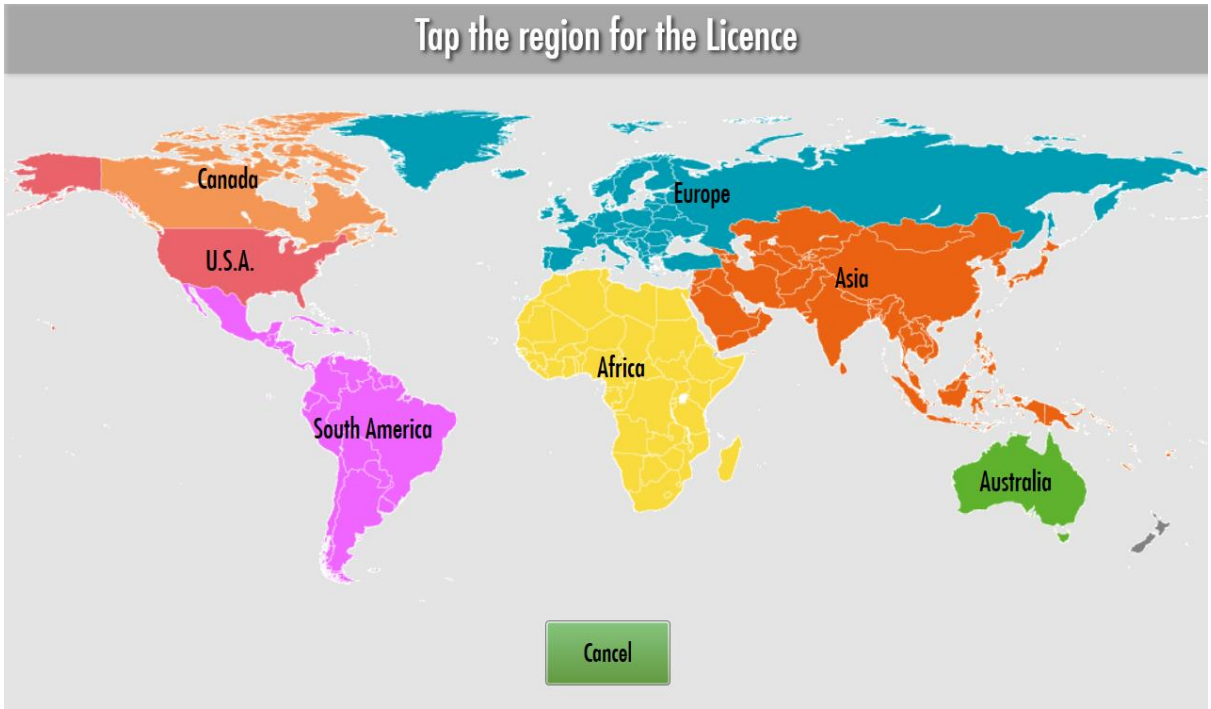
Standard Enrolment Procedure

1. From the main screen in QikSKAN, press the [Enrol] button. Here you will be presented with the Terms and Conditions and the Privacy Statement for using QikPASS. You may view the policies by following the embedded link in this page (http://qikid.com/legal). This will open a new window over QikSKAN in the default browser, with the policies displayed.
2. To continue with the enrolment, press [I Agree] or else press [Cancel] to return to the main screen
3. Now you will be presented with the **enrolment screen:**

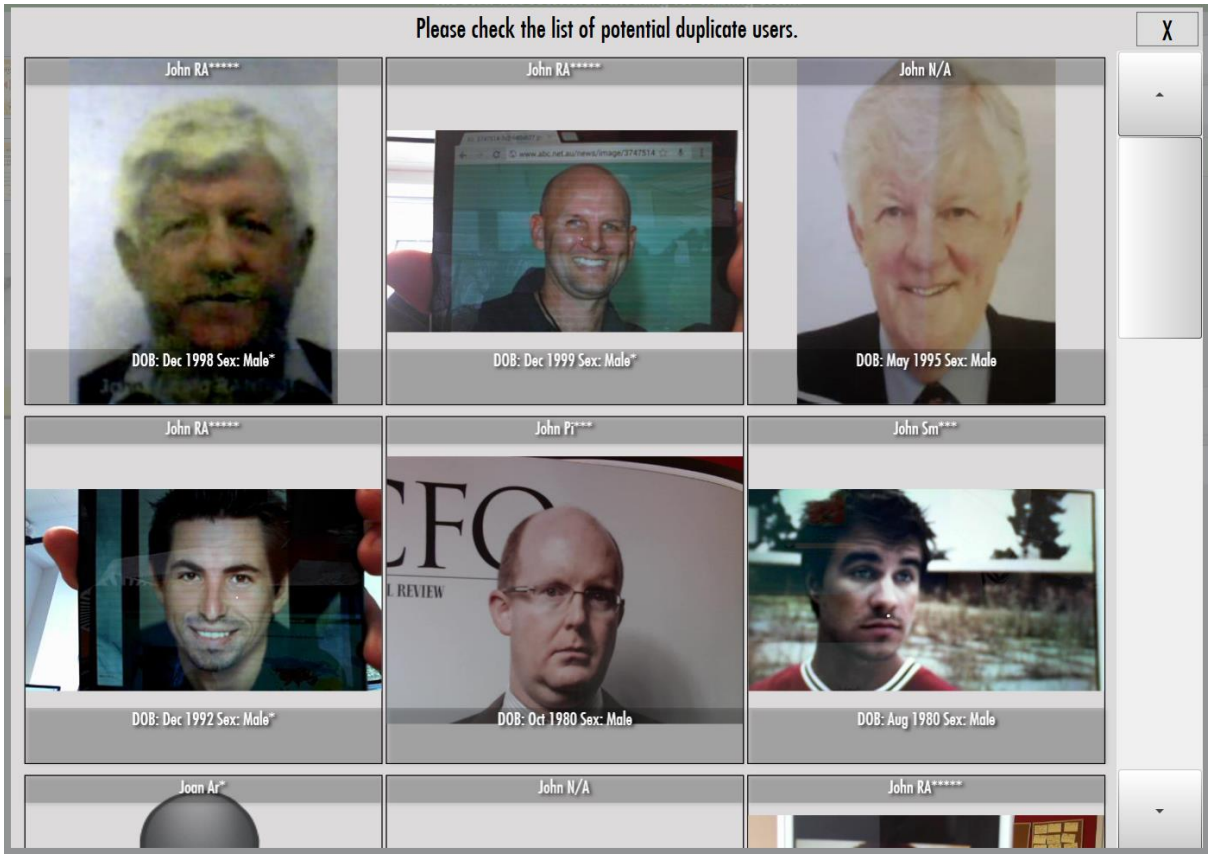


4. To enrol a new patron, place their ID in the scanner and press the corresponding button on the left side of the screen

5. For an international drivers license, press the [Intl. License] button and the world map will be displayed. Here, select the region most accurate to the patron's license.



6. If you cannot identify the origin of the patron's ID, press the [?] Unknown button.
7. After scanning the document, QikSKAN will search for similar IDs and display up to 20 close matches. If any of these users is the patron currently being enrolled, press their entry in the list and press [Confirm]. Otherwise, press the [X] in the top-right of the window.



8. The scanned ID will now appear on the screen, replacing the sample license image. If the ID appears incorrect, correct the ID in the scanning tray and scan the document again as above.
9. QikSKAN will attempt to fill in the patron's full name, date of birth and residential address, though this should be checked and corrected as needed by pressing the incorrect field and typing the correct details.

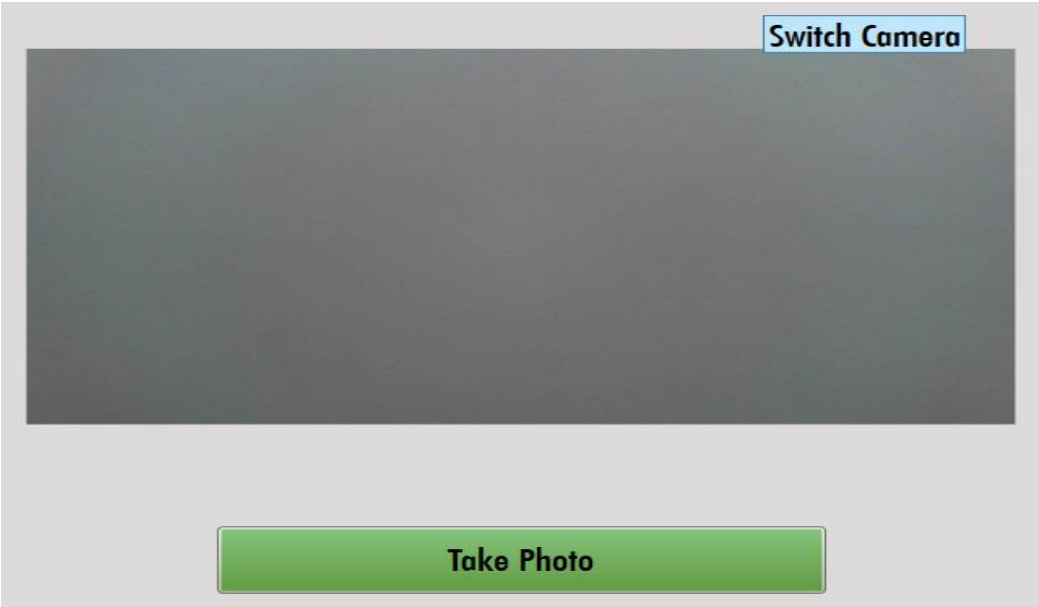
If an email address or mobile number is not provided during enrolment, the patron will not be able to login to User Portal.

10. If the Enrolment Validation setting is set to “Full Validation” or “Club”, either a valid email address or mobile phone number are required. Enter by pressing on the field and entering the details. The requirement for contact details may be temporarily disabled by pressing [Options] in the bottom-right of the screen and then checking the box “Is User Contact Optional”. This option acts as the Enrolment Validation setting “Full but User Contact Optional” however it only lasts for the current enrolment, as well as requiring you to wait for 30 seconds before proceeding to the next screen.

X
Enrollment Validation
Is User Contact Optional
(if checked this user will NOT be required to enter their email address or mobile number when enrolling)

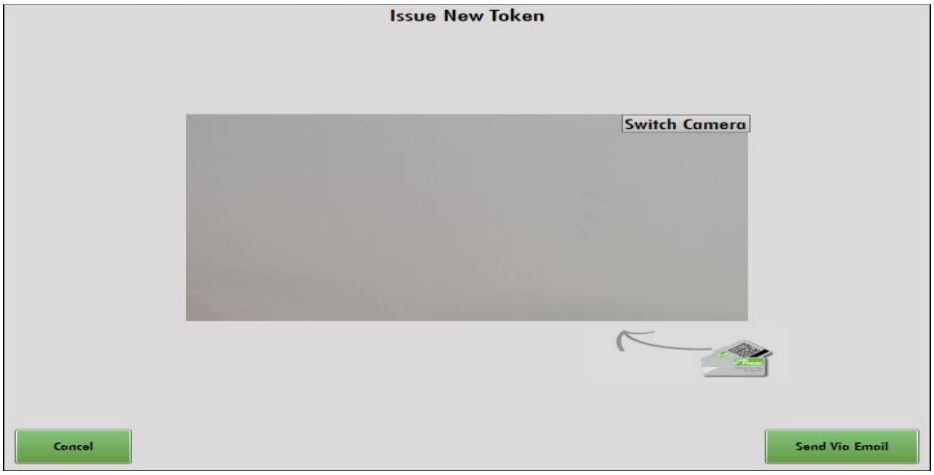
Depending on the Enrolment Validation setting, the operator may decide to not enter an email address and mobile number. If this is the case, the patron being enrolled will not have access to the user portal, as they will not have any login credentials. An email address can be provided at their next venue authorisation, or manually updated by an operator.

11. After you are satisfied that all details have been entered correctly, press the [Confirm] button in the bottom-right corner of the screen.
12. The new patron must have their photograph taken, to be associated with their user account. To take their photo, line up their face in the camera feed and press the [Take Photo] button.



13. If you are satisfied with the quality of the photo, press either the [Save] button or the [Save Offline] button, otherwise press [Retake] and take their photo again until you are satisfied with the photo. Pressing the [Save] button sends the photo to the server to check for duplicates before allowing you to proceed. Pressing the [Save Offline] button stores the photograph locally so that you don't have to wait for a response from the server. Saving the user's photo offline reduces the time taken, but may cause security issues as the user's photo will not be checked against the database.
14. Upon pressing [Save], you will be presented with a window displaying a number of potential duplicate users based on the photograph and name of the user being enrolled. If none of the users match, press the [X] button in the top-right of the window. If any of these users' faces match the photograph with high confidence, you will not be able to proceed.

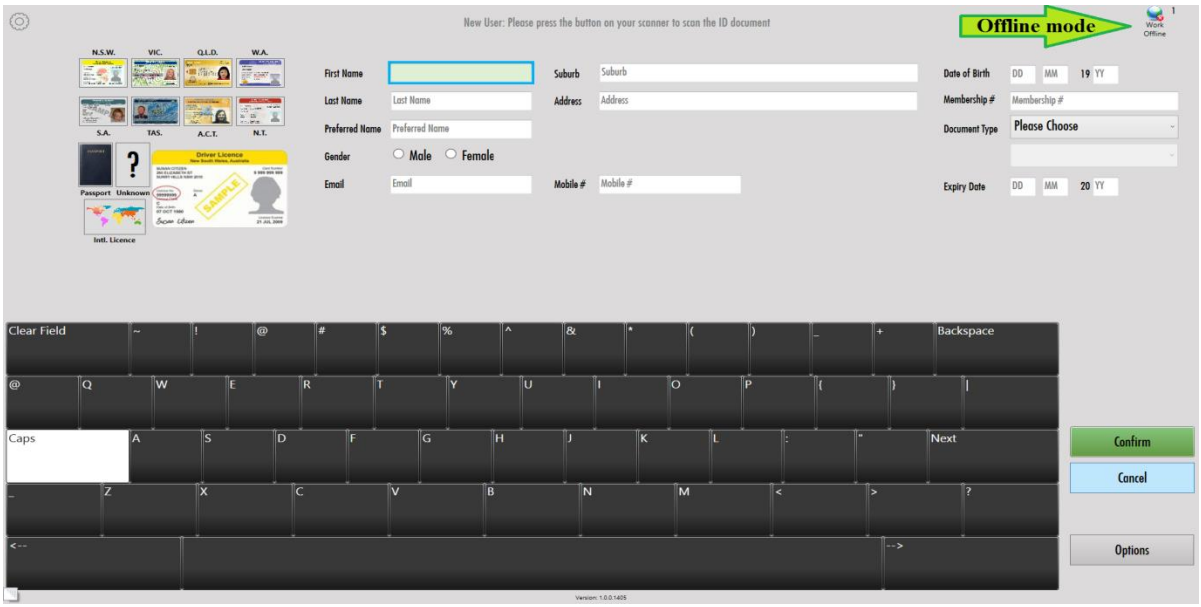
15. You will now be presented with the user's profile screen, where you may view their name and photograph.
16. If the enrolment of this user was started by scanning a QikPASS token that token will now be associated with this user. Otherwise you may issue the user a new QikPASS token by pressing the QR code icon, which allows you to scan a new token with the camera or else issue a new QR code to the user via email. The token will be immediately associated with this user's account.



If a currently used token is scanned as a new token, the token will remain associated with the original user.

Offline Enrolment Procedure

In offline mode, QikSKAN follows the same enrolment procedure as described in the previous section except duplicate validation and enrolments are queued. On successful offline enrolment, QikSKAN will display this user message The enrolment data was queued and will be sent when the client is back online and increment pending enrolments counter displayed near icon , as shown in figure below.

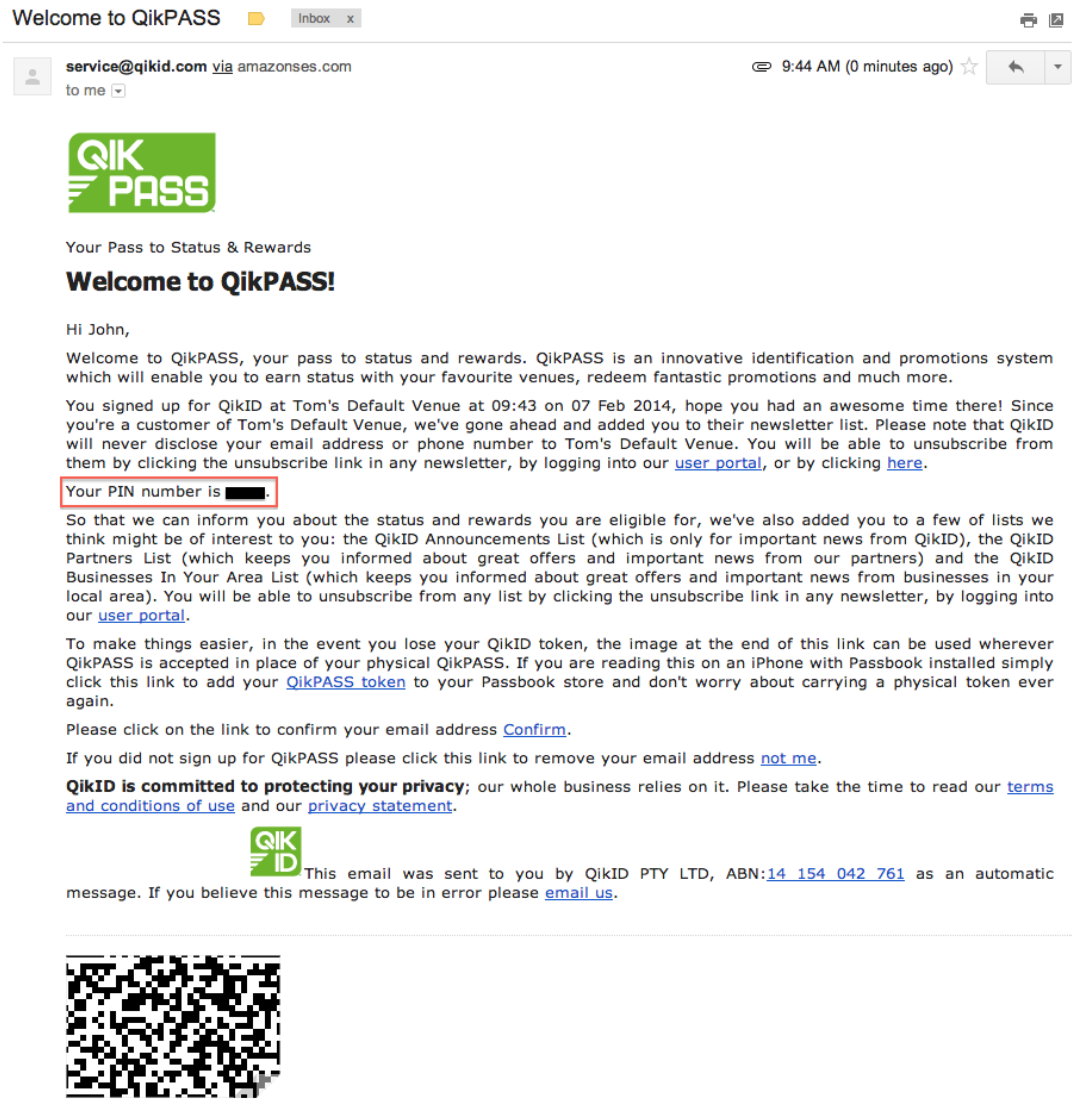


Procedure to logging into User Portal

Once the enrolment process has been completed, the patron will be able to access the User Portal using an email address or mobile number provided during enrolment.

BY EMAIL

1. The patron will receive a welcome email containing a default PIN number. This PIN along with the email address that was provided during enrolment can be used to login to the User Portal.



Welcome to QikPASS Inbox x

service@qikid.com via amazonses.com 9:44 AM (0 minutes ago)
to me

Your Pass to Status & Rewards

Welcome to QikPASS!

Hi John,

Welcome to QikPASS, your pass to status and rewards. QikPASS is an innovative identification and promotions system which will enable you to earn status with your favourite venues, redeem fantastic promotions and much more.

You signed up for QikID at Tom's Default Venue at 09:43 on 07 Feb 2014, hope you had an awesome time there! Since you're a customer of Tom's Default Venue, we've gone ahead and added you to their newsletter list. Please note that QikID will never disclose your email address or phone number to Tom's Default Venue. You will be able to unsubscribe from them by clicking the unsubscribe link in any newsletter, by logging into our user portal, or by clicking here.

Your PIN number is [redacted].

So that we can inform you about the status and rewards you are eligible for, we've also added you to a few of lists we think might be of interest to you: the QikID Announcements List (which is only for important news from QikID), the QikID Partners List (which keeps you informed about great offers and important news from our partners) and the QikID Businesses In Your Area List (which keeps you informed about great offers and important news from businesses in your local area). You will be able to unsubscribe from any list by clicking the unsubscribe link in any newsletter, by logging into our user portal.

To make things easier, in the event you lose your QikID token, the image at the end of this link can be used wherever QikPASS is accepted in place of your physical QikPASS. If you are reading this on an iPhone with Passbook installed simply click this link to add your QikPASS token to your Passbook store and don't worry about carrying a physical token ever again.

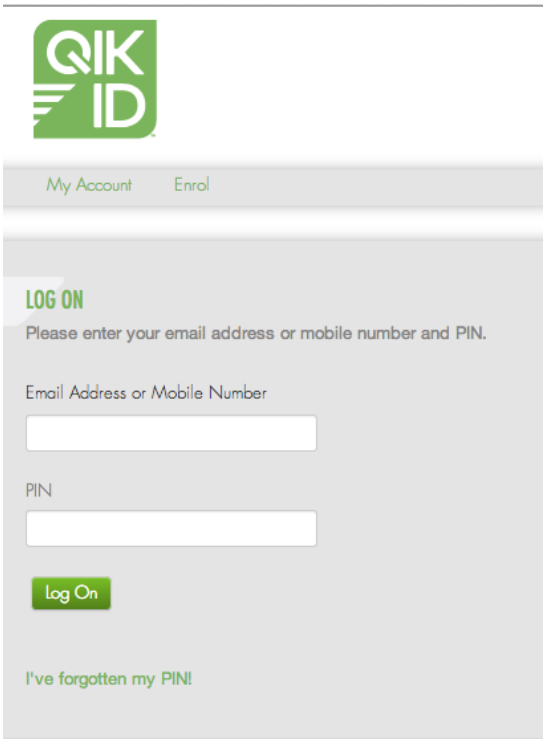
Please click on the link to confirm your email address Confirm.

If you did not sign up for QikPASS please click this link to remove your email address not me.

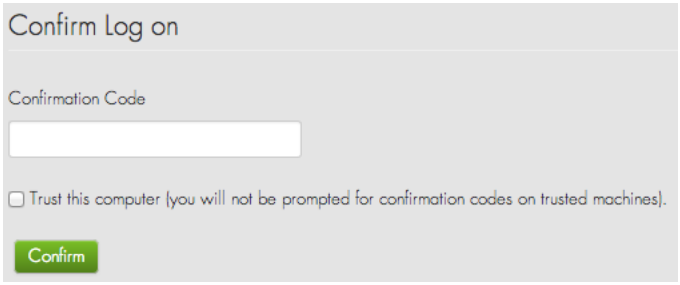
QikID is committed to protecting your privacy; our whole business relies on it. Please take the time to read our terms and conditions of use and our privacy statement.

This email was sent to you by QikID PTY LTD, ABN:14 154 042 761 as an automatic message. If you believe this message to be in error please email us.

2. By clicking the 'user portal' links given in the email, the newly enrolled patron can navigate to the User Portal where they can login using their email address and default PIN number. An electronic QikPASS token is also provided for venue authorisations.



3. After the patron has entered their login details they will then be prompted to enter a confirmation code to proceed, which is sent to the email address used to login.

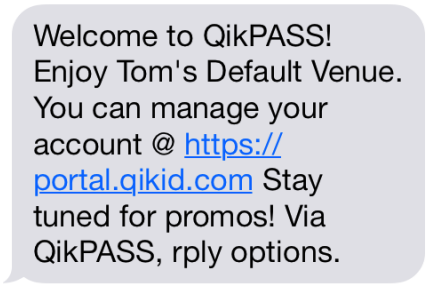

Confirm Log on
Confirmation Code
Trust this computer (you will not be prompted for confirmation codes on trusted machines).
Confirm

4. Having successfully entered the confirmation code the patron will now have access to the User Portal. Here they can:

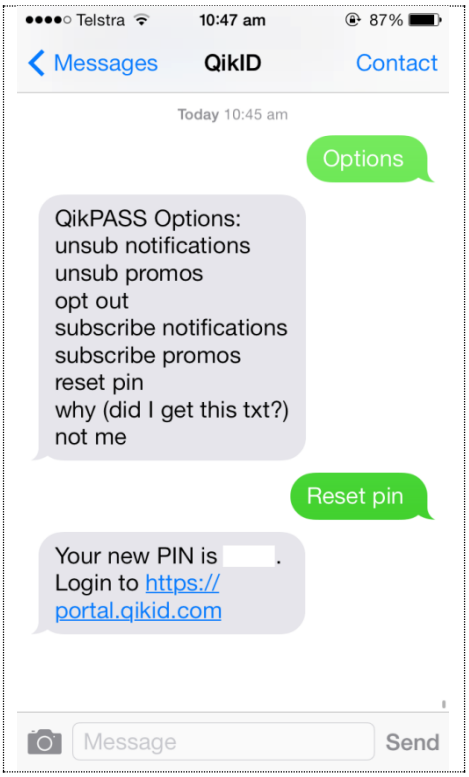
- View/edit personal details
- View venue authorisations
- View venue sightings
- Manage and request new user tokens
- Manage list memberships
- Change PIN
- Authorise QikPASS with Facebook.

BY MOBILE NUMBER

1. The patron will receive a welcome text message where a link is provided to manage their User Account.

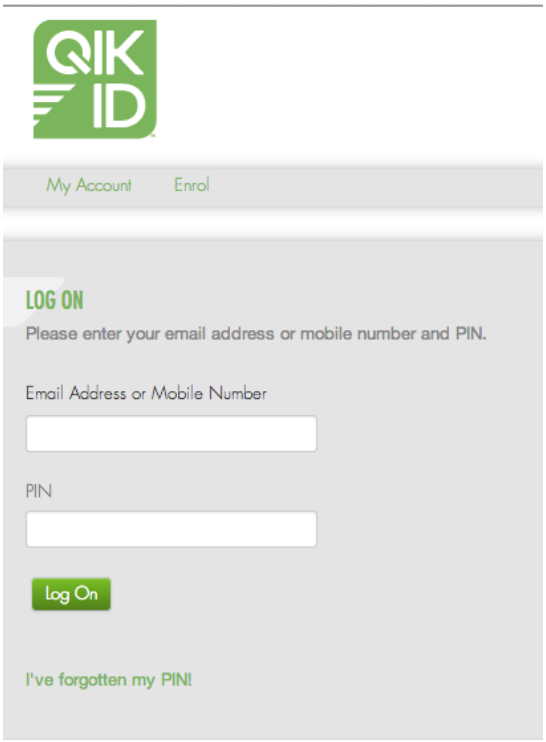

Welcome to QikPASS! Enjoy Tom's Default Venue. You can manage your account @ https://portal.qikid.com Stay tuned for promos! Via QikPASS, rply options.

2. Having received the initial QikPASS welcome text message, the patrons can text **options** to receive a list of options.
3. Texting reset pin will provide the patron with a default pin. From there the patron can enter their mobile number and default pin into the User Portal to login.

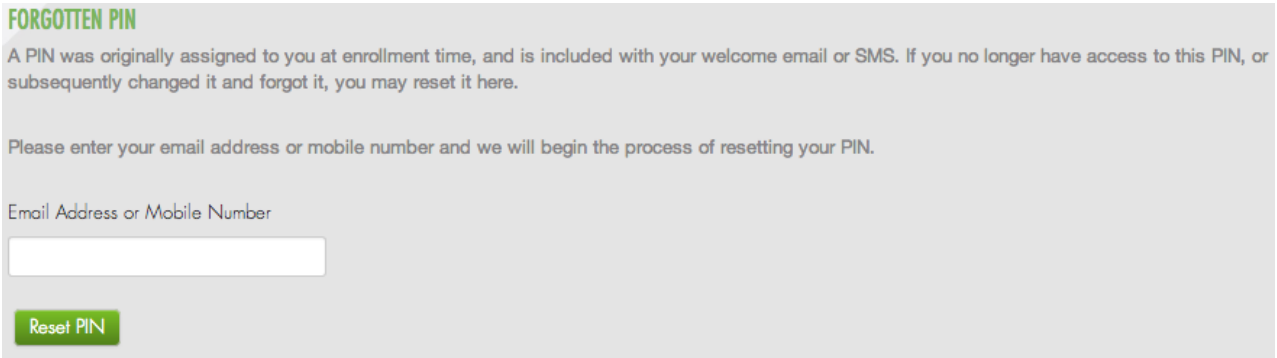


Resetting PIN

If for any reason the patron forgets their PIN or does not receive an email or text message, the 'I've forgotten my PIN!' option can be used in the User Portal.



The patron will be able to enter their email address or mobile number into the provided field where a new PIN will be sent.


FORGOTTEN PIN
A PIN was originally assigned to you at enrollment time, and is included with your welcome email or SMS. If you no longer have access to this PIN, or subsequently changed it and forgot it, you may reset it here.
Please enter your email address or mobile number and we will begin the process of resetting your PIN.
Email Address or Mobile Number
Reset PIN

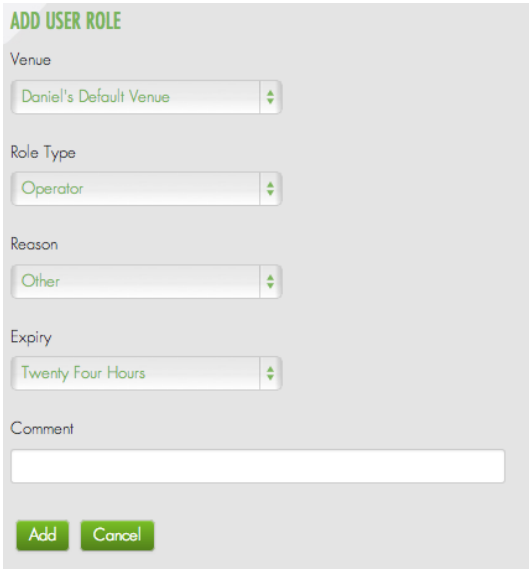
Procedure to Enrol a New Operator

QikSKAN will allow any user to be assigned a given role at a venue using the following steps:

1. Login to the User Portal and navigate to the [Authorisations] tab. It shows the list of all patrons that have entered the venue.
2. Under 'Details' click the green icon for the user that you would like to assign a role to. It will open the 'User Details' page of enrolled user.

3. Scroll directly to the bottom of the page and there should be a 'Roles' section.

4. Click on the green plus icon in the right hand corner and you will be directed to the 'ADD USER ROLE' page. Here, a role can be assigned to the user for a specific venue. Having selected the correct details, click the 'Add' button and you will be directed back to the 'User Details' page.



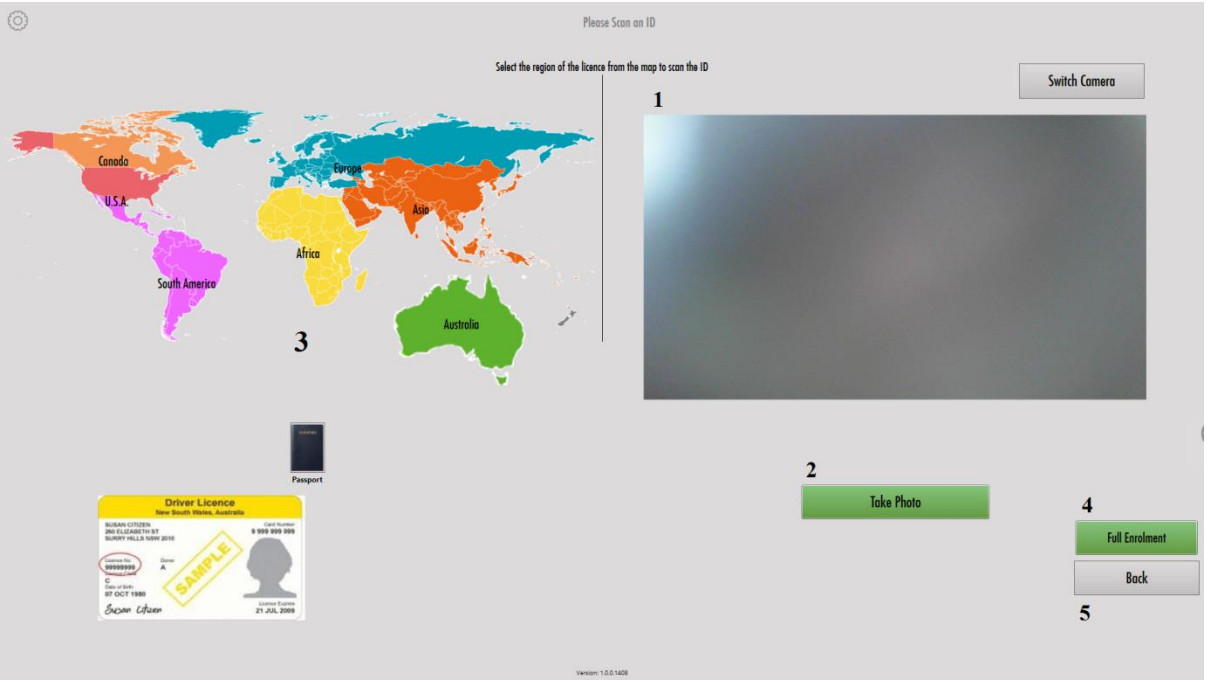
5. If the role was successfully assigned to the user, 'the role was successfully added' will be displayed at the top of the page. Working your way down the page to the 'Roles' section, the role type assigned to the user should now be listed.

IN ID SCANNING ONLY MODE

QikSKAN will allow the operator to authorise patrons by ID scanning only in both online (standard) and offline mode. It can be accessed from **main screen** or **work offline screen**. QikSKAN performs validations and duplicate checks in standard ID Scanning Only mode.

Standard ID Scanning Only

The standard ID Scanning Only screen is shown with brief feature description as below.



1 – Camera feed section for **token scan** and **Face photo**.

2 – Button to take face photo of patron.

3 – The world map and passport icon to select the region most accurate to the patron's license and to scan the patron's passport, respectively.

4 – Button to **enrol a new patron**.

5 – Button to **navigate back** to main screen or work offline screen, as appropriate.

The standard (online) ID Scanning Only mode operates in much the same way as the main screen, allowing the following functions:

Authorisation by Token Scan: Scanning a patron's token will authorise the patron in the same way as from the main screen.

Enrolment by Licence Scan: Scan the patron's preferred form of ID. Optionally, take a photo of the patron, or a new token may be scanned to be associated with the patron to be enrolled.

STEPS for ID Scanning Only

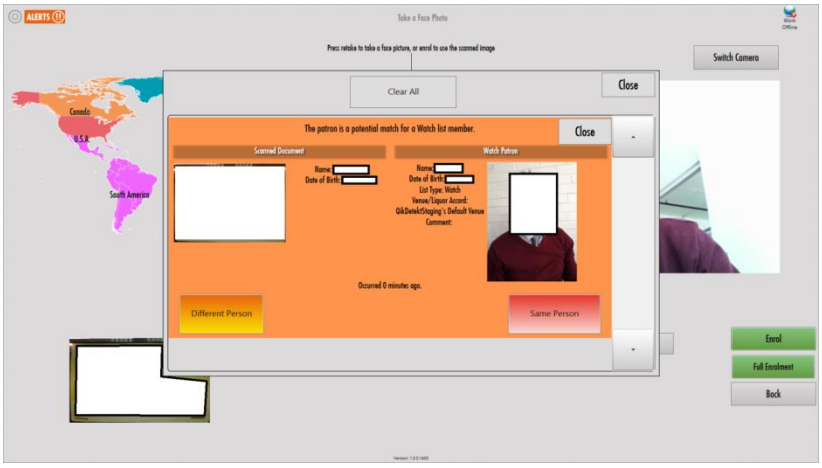
1. Scan the patron's preferred form of ID or Scan patron's QR code token.
2. Check notifications (if any) and respond as appropriate.
3. Press [Enrol] button.

A list of potential duplicate patrons will be displayed. If one of the entries is the patron being enrolled, press their profile to accept or decline authorisation.

Offline ID Scanning Only

In offline mode, **ID Scanning only** may be used to scan a patron's ID without any verification or duplicate checks whereas authorisation of extant patrons using a valid token is unavailable. This is the fastest way.

If device is configured with a specific venue and QikSKAN is running in offline mode with internet connection, QikSKAN will display Alerts for WATCHED, BANNED or VIP patrons.



STANDARD AUTHORIZATION METHODS

STEPS for Authorise by Token Scan

1. In main screen, hold either the physical token or the emailed QR code in front of the camera.
2. QikSKAN will show **existing user authorisation** window. Press [Accept] button to authorise patron.

STEPS for Authorise by Face

1. In main screen, press [Authorise by Face] button.
2. Line up patron's face in front of camera.
3. Press [Take Photo] button (retake if needed).
4. QikSKAN will display list of possible matches. Select the correct match.
5. QikSKAN will show **existing user authorisation** window. Press [Accept] button to authorise patron.

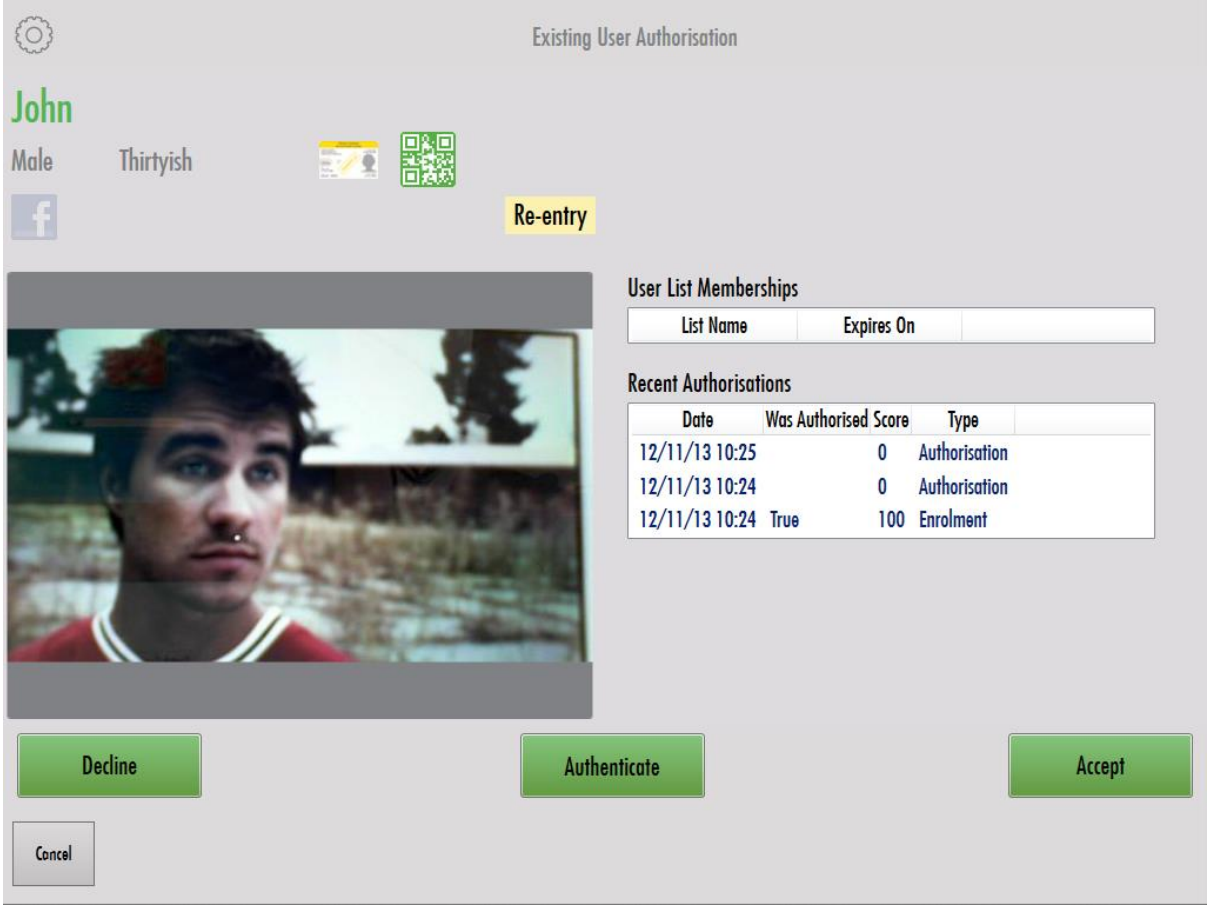
STEPS for Authorise by Name

1. In main screen, press [Authorise by Name] button.
2. Line up patron's face in front of camera.
3. Press [Take Photo] button (retake if needed).
4. Enter first and last name to find the user. Press [Find User] button.
5. QikSKAN will display list of possible matches. Select the correct match.

6. QikSKAN will show **existing user authorisation** window. Press [Accept] button to authorise patron.

Existing User Authorisation Window

QikSKAN display "Existing User Authorisation" window when existing patron is selected from potential matches.



User List Memberships will show if the user is currently on any Ban, Watch or VIP lists. If a patron is authenticated and then has been banned at the venue, the background will turn red and the red icon will appear next to the name in their profile. If the patron is on watch list, an orange icon will appear whereas if the patron is on the VIP list the green icon will appear next to name in profile view.

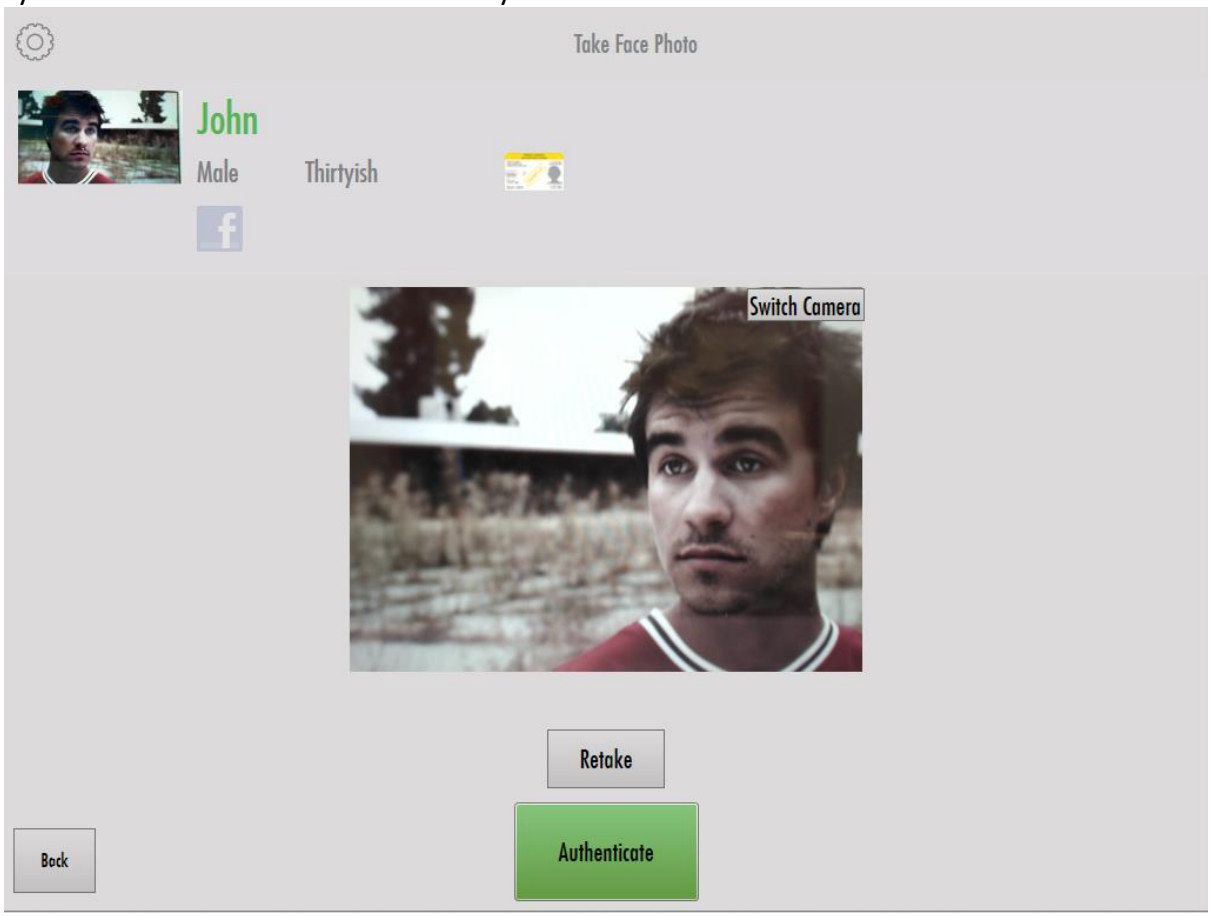
Recent Authorisations will show a list of the most recent times that this patron has been authenticated at a venue. Under "Type", the action performed will be listed, such as "Enrolment", "Authorisation", "Entry" and "Declined".

Notifications will also be displayed on this screen, as seen in the above image, where the user has been flagged in yellow as having re-entered the venue. The above profile has not been linked with Facebook, as the Facebook icon is washed out.

From this screen, a number of actions may be taken.

ACCEPT: Pressing the [Accept] button authorises the patron to enter the venue.

AUTHENTICATE: Authenticating the patron means taking another photo of the user that the system will use in the future to identify their face.



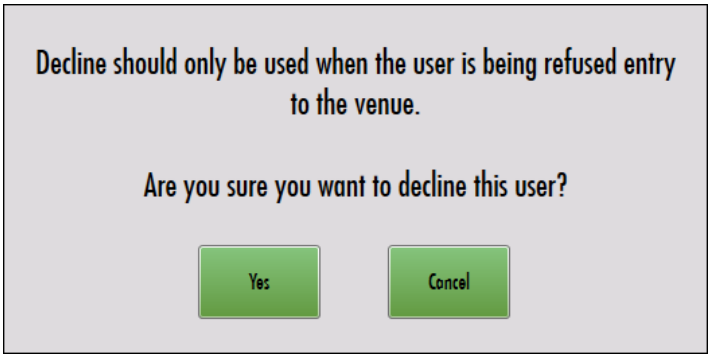
STEPS to Authenticate:

1. From the user's profile page, press the [Authenticate] button.
2. Line up the user's face in the camera feed.
3. Press the [Take Photo] button.

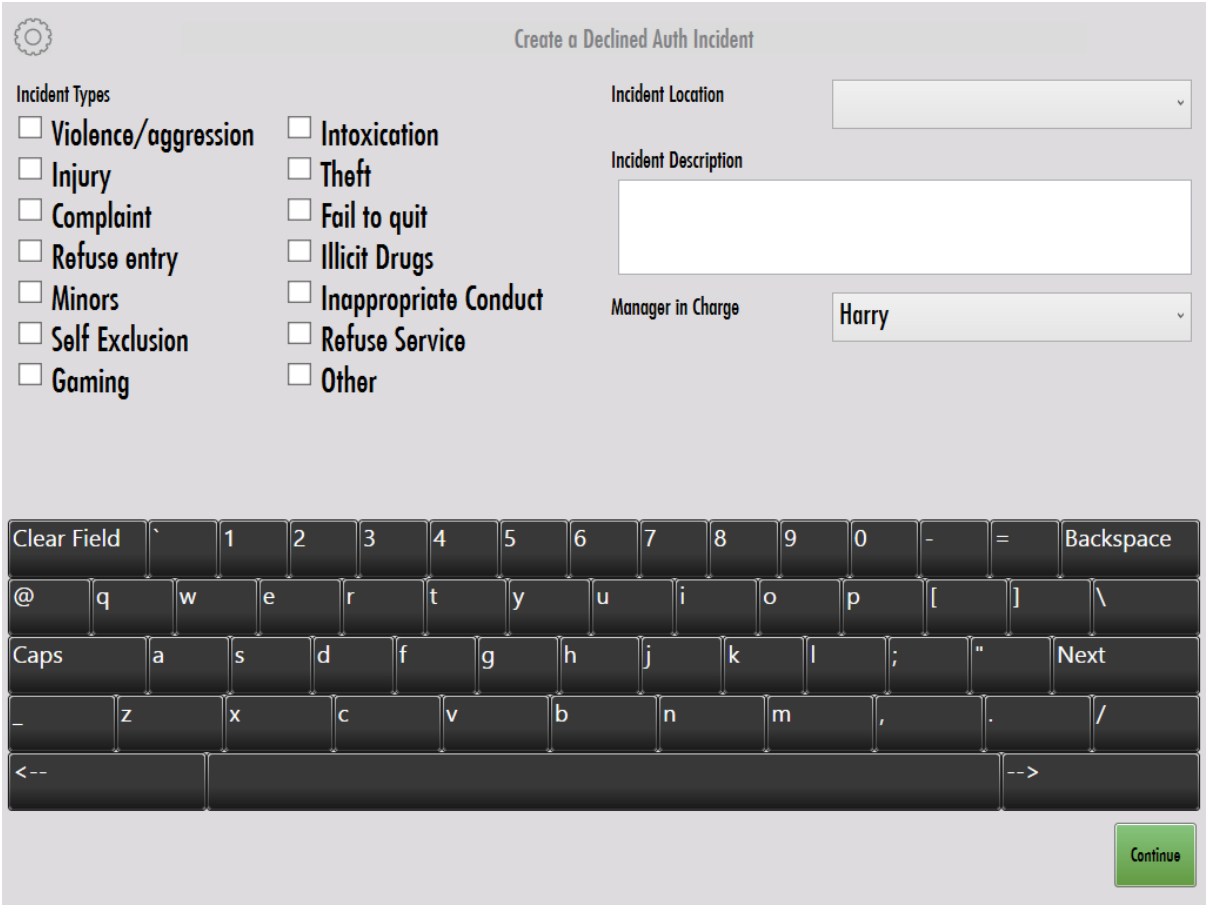
4. If you are not satisfied with the photo, press the [Retake] button and repeat the last few steps.
5. Press the [Authenticate] button.

QikSKAN will return to the existing user authorisation, but without the [Authenticate] button visible.

DECLINE: Press the [Decline] button.


Decline should only be used when the user is being refused entry to the venue.
Are you sure you want to decline this user?
Yes
Cancel

Press the [Yes] button to decline the user, or the [Cancel] button to return to the previous screen.



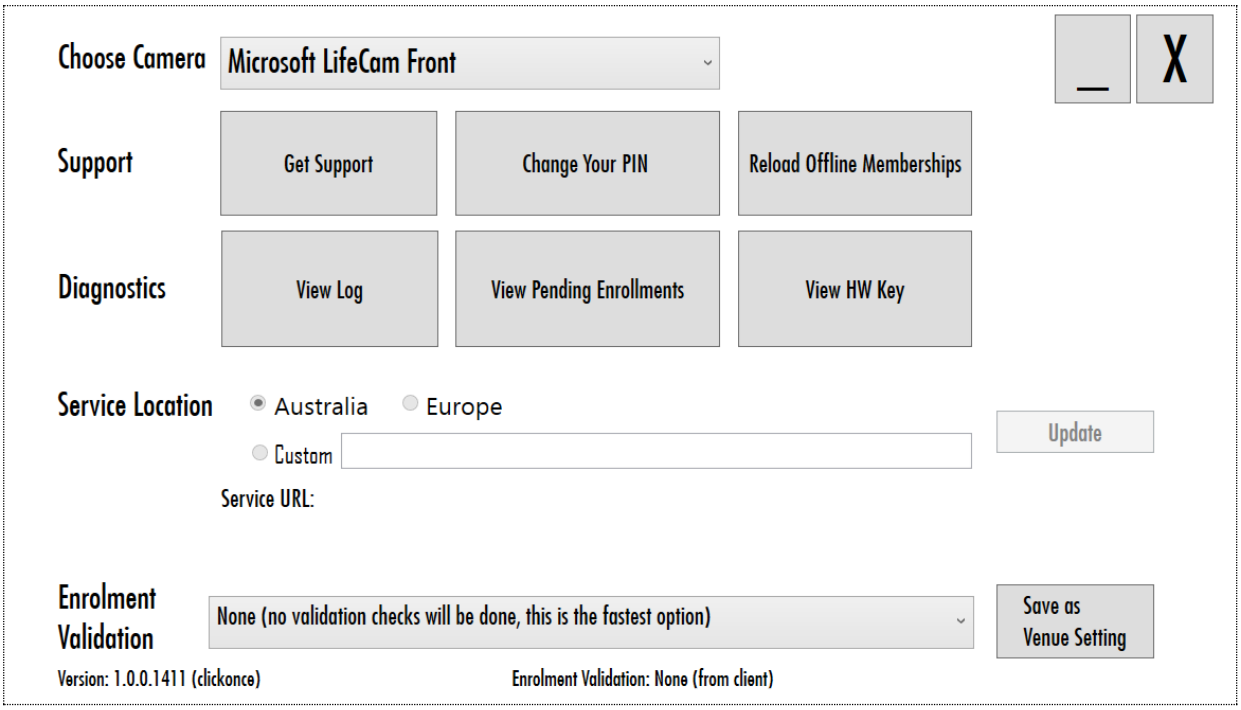
Select the type of incident that occurred. Multiple types may be selected.

"Refuse Entry" is checked by default. Set the location of the incident. Note that the most recently used location will be selected by default, so double-check this when filing an incident report.

QikSKAN Settings

Overview

From the QikSKAN main screen, press icon in the top left corner of the screen to access the setting menu. QikSKAN setting window is shown below with detailed description.



Choose Camera

Press drop down list to select a camera to use from all cameras attached to and recognised by the system. QikSKAN will allow a user to select an external webcam or either of the built-in webcams.

Get Support

User can select this option to give remote access of QikSKAN to QikID for support purposes.

CHANGE YOUR PIN

User can select this option to change the PIN (used to login to QikSKAN). When selected, user is prompted to enter current PIN, then enter a new PIN and confirm new PIN. This option is available when the internet is available and user is already logged into QikSKAN.

RELOAD OFFLINE MEMBERSHIPS

User can select this option to refresh the offline Ban/Watch/VIP lists for alerts.

VIEW LOG

User can select this option to open the QikSKAN client-side log to check errors.

VIEW PENDING ENROLMENTS

User can select this option to view a serialised list of users to be enrolled offline, and the time and date of their enrolment.

VIEW HARDWARE KEY

This will open a popup window that displays the hardware key. This is useful for giving the device a license key when setting up a new device at venue.

SERVICE LOCATION

QikSKAN will allow the user to select the location where the service is hosted. Australia is set by default.

WITH ENROLMENT VALIDATIONS

Pressing this drop-down box allows the user to select from all enrolment validation settings, listed below. The current enrolment validation setting is displayed at the bottom-middle of the settings window. A venue co-owner may change the current enrolment setting to the default setting for all devices in the venue by pressing the [Save as Venue Setting] button.

Full Validation

This setting requires all details to be entered during enrolment, including one form of contact (either email or mobile phone). This setting will force a check for duplicate users on the server based on the scanned ID, the user's photo and the user's name

Full But User Contact Optional

This setting is identical to "Full Validation", however no contact details are required to be entered during enrolment.

Club Validation

This setting has the same requirements as "Full Validation" additionally checking the proximity of the user's residential address to the address of the venue.

None

This is the fastest option, as no duplicate checks will be done on the user's scanned ID, name or photograph

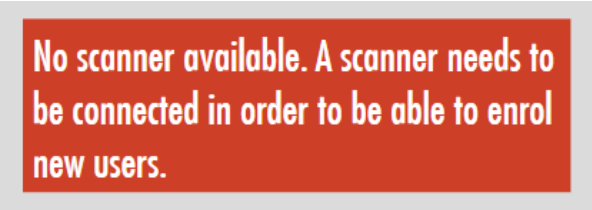
None but Check for Duplicates

This setting has no validation checks, as in "None", however it will run checks for duplicate users.

TROUBLESHOOTING

Issue	Possible Solution
Camera Feed Frozen	1. Press [Switch Camera] button 2. Press [Switch Camera] button again Or 1. Exit QikSKAN 2. Reopen QikSKAN
Camera won't scan a user's token.	1. Make sure you are in QikSKAN's main screen 2. Make sure the camera feed isn't frozen 3. Make sure the QR code is clearly visible in the camera feed 4. Try the other camera by pressing the [Switch Camera] button The camera with the least glare will be the best Or 1. Exit QikSKAN 2. Reopen QikSKAN
Some buttons aren't visible	QikSKAN may be operating in offline mode 1. Swipe in from right-hand side of screen 2. Press the settings cog

	 3. **Press the network icon** 4. **Check that the device is connected to the correct network and there is an internet connection** **Or** 1. **Log off QikSKAN and exit** 2. **In the taskbar, press the network icon** 3. **Check that the device is connected to the correct network and there is an internet connection** **Screen resolution may be too low** 1. **Log off QikSKAN and exit** 2. **Right-click on the desktop** 3. **Select "Screen Resolution" from the menu** 4. **Select the drop-down box for screen resolution** 5. **Make sure the slider is set to one of the following resolutions:** **1024x768** **1280x720** **1920x1080**
Text too small	1. **Log off QikSKAN and exit** 2. **Right-click on the desktop** 3. **Select "Screen Resolution" from the menu** 4. **In the bottom half of this window, select "Make text and other items smaller or larger**

	5. QikSKAN supports the Small (100%) and Medium (125%) settings
Camera feed blank	Could be due to positioning of camera or missing connection 1. Press [Switch Camera] button until problem resolved Or 1. Log off QikSKAN and exit 2. Relaunch QikSKAN If these don't work, it could be a hardware issue.
Scanner not functioning properly or error displayed: 	1. In QikSKAN, press the settings cog in the top-left of the screen 2. In the "Scanner" section, press [Restart Scanner] Or 1. Log off QikSKAN and exit 2. Relaunch QikSKAN Or 1. Unplug scanner's USB cable 2. Plug in scanner via USB Or 1. Turn device off 2. Turn device on